Society for College and University Planning

Trends in Higher Education

February 2006

The Society for College and University Planning publishes this quarterly environmental scanning report as one outcome of routine work which informs our board of directors. We share this in the interest of providing our members and the broader higher education community with an ongoing analysis of trends that affect integrated planning in institutions. For your convenience, trends are categorized as Demographics, Economy, Environment, Global Education, Learning, Politics, and Technology. Within each category we share some facts from our environmental scanning and we also share with you some of our thoughts about the implications of those facts.

We hope that you find it useful and welcome your thoughts and comments; share them by email at trends@scup.org. This report and others in the series can be found in SCUP's website.

Demographics

Fact: **There is a growing dissatisfaction with the usefulness and accuracy of national statistics on the race/ethnicity of students.**
- A recent study published by the Association of American Colleges and Universities (AAC&U) showed, for example, that the increase in the number of students identifying as 'other" or 'unknown' likely leads to overstated enrollment figures for minorities.
- More students are following the larger demographic trend of reporting as bi- or multi-racial, at least when given the opportunity.

Our thoughts:
- This trend affects every level of the institution and the students, from the admissions process through fledgling outcomes analysis, more researchers will focus on the validity of the numbers.
- Campuses may need to improve the accuracy of their statistics by not only collecting data on student admission applications, but through surveys conducted once students are already on campus, such as the Cooperative Institutional Research Program (CIRP) used by the University of California system.
- Among other changes, the National Center for Educational Statistics (NCES) may need to follow the lead of the 2000 census and implement for IPEDS a multiple race classification system. This may still not change the trend.

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Fact: **Among four-year campuses, members of the Council for Christian Colleges and Universities (CCCU) are experiencing the fastest growth in student numbers. A recent report by the Higher Education Research Institute found that:**

- Many incoming students expect their school will enhance their self-understanding, [help] them develop personal values, and [encourage] their expression of spirituality.
- About 80 percent of students believe in a god, attend religious services, pray, and discuss religion with family and friends.
- Religious and spiritual attitudes among students can affect their political orientation and attitude and their wellbeing.

Our thoughts:

- Those faith-based schools that attract not just members of a specific faith, but also students seeking education with a clear spiritual mission, will likely struggle to accommodate growing numbers of students without state support.
- Health centers and counseling centers will increasingly seek to determine the effects of spiritual beliefs on students' wellbeing.

Fact: **Some institutions are strengthening the old concept of "in loco parentis" and accepting a greater responsibility for more parts of students' lives. This trend is driven as much by parents as by the needs of the campus to influence student behavior.**

- Campuses are using both law enforcement and social norms programs to try to reduce student drinking, both on and off campus.
- The University of Rhode Island has extended its student disciplinary rules to the actions of its students both on and off campus.

Our thoughts:

- Admissions and counseling, and even academic offices, need to be better prepared to view both the student and the student's parents as customers.
- Expect more and better campus/community collaboration on issues of student behavior on both sides of the campus edge.
- Alumni organizations and administrators would do well to find better ways to be of value to students in the first decade of their post-matriculation life.

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Economics

The combination punch of Hurricane Katrina's effect on building materials and supplies, plus increases in both the cost of oil and of natural gas have created unexpected deficiencies in operating budgets for the current fiscal year and in capital budgets.

Our thoughts:

- Just as institutions were scrambling early this winter to reduce heating costs and increase heating efficiency—efforts that got a lot of media attention—so will there be a similar cycle in the early summer regarding air conditioning costs and efficiencies. That twice-a-year emphasis will be a regular cycle as costs continue to increase and should be addressed in institutional planning.
- One way institutions can decrease some energy costs is to consolidate the buildings which need to be 'open' and thus heated during some time periods. If there are only nine classes being held on campus at 7:00 PM, why not ensure they're all in the same classroom building so you can close down the others?
- Anticipate and plan for conflict between building contractors and institutions about who's responsible for large increases in the cost of building materials.
- It is likely that more staff positions will be created on campus with the aim of increasing energy efficiencies in operations, including working with students and staff to reduce their energy use. Such positions can be paid for from the resultant savings.
- The attractiveness of alternative energy sources such as solar, wind, and biodeisel will grow as some of these petroleum-based products' prices stay high, or go higher.

Fact: **Large companies outside of higher education are outsourcing, offshoring, eliminating pensions, increasing employee contributions for medical insurance, and in some cases drastically slashing jobs and pay.**

- CUPA-HR, the College and University Professional Association for Human Resources, reported that most university employees paid more for their health insurance in 2004 than they did in 2003.
- Many hospitals on campuses are now outsourcing their medical transcription to offshore vendors.
- A college in Scotland is creating two open-space offices that all staff and faculty will work out of—no one on campus will have a private office.

Our thoughts:

- More of these same changes may be inevitable for higher education institutions, as they face the same sets of economic realities.
- Expect to hear of more higher education institutions reducing staff (and increasing workloads for those who remain) in a variety of areas, a trend that may be seen sooner in medical campuses than elsewhere as institutions can now, for example, outsource the analysis of radiographic images overseas using digital files.
- Outsourcing information technology staff is far more difficult for higher education than for the commercial world, but there is likely to be an increase in the licensing

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of web-based functionalities run by outside companies.

- Cost-cutting in areas of employee salaries and benefits is one of the trickiest projects administrators can undertake, but some institutions will have to do so.

Environment

Fact: **Communities are increasingly turning to renewable energy sources and green practices. 'Green' and 'sustainability' have entered the lexicon of businesses as key operating principles.**

- Wal-Mart has embraced green, building two of its super stores with structures that rely heavily on sustainable design and green technology.
- Legislation is pending in California to significantly increase the use of solar power through the "Million Roofs Initiative."
- Canadian and European business programs integrate sustainability issues as a vital part of risk management throughout their curricula.

Our thoughts: **Every increase in awareness and practice brings us closer to true sustainability. We hope this accelerates and happens quickly enough to avoid some of the more serious potential environmental disasters.**

- The European Commission (EC) added European airlines to Europe's emission-trading scheme this fall. The EC saw this as preferable to imposing a blanket tax to reduce emissions.
- The United Kingdom may not meet its 60 percent emission-reduction target by 2050. Coping with the consequences of failing to meet goals is important.
- The rise in the price of a barrel of oil has seemed to be only a blip on the world's screen, as prices fall back to around $60 per barrel, but all planning should account for the likelihood of increased oil prices.

Fact: **LEED (Leadership in Energy and Environmental Design) certification has been the major successful driving force in transforming the built-environment industry.**

- The American Institute of Architects (AIA) has announced a goal of a 50 percent reduction in fossil fuels used in constructing and operating buildings by 2010.
- The latest release of LEED certification standards by the United States Green Building Council (USGBC)—LEED for Multiple Buildings and On-Campus Building Projects (AGMBC)—will be percolating into campus planners' and architects' lives.

Our thoughts:

- The built-environment design industry will be more aggressive in seeking out graduates trained in green practices, and will also be looking to partner with institutions to ensure that at least graduate-level programs include a considerable amount of learning related to principles of sustainability and smart growth.
- Campuses need to think about doing a better job, once a green building is completed, of using it as a teaching and learning tool.
- Who will have the first overall LEED-certified campus?

Fact: On some large campuses, a number of campus-wide coalitions of disciplinary centers, many with significant funding, are being created to bring all aspects of research and teaching under a single umbrella— following the recent lead toward multidisciplinary work in the life sciences.

- The $15M-funded International Institute for Sustainability (ISS) at Arizona State University.
- The $10.5M funding of the Graham Sustainability Institute at the University of Michigan. Michigan also recently received nearly $1M from the Alcoa Foundation as an academic partner in its six-year Conservation and Sustainability Fellowship Program.

Our thoughts:

- We hope that these centers will work hard to integrate with learning and operations, not just among academic disciplines and in research.
- Now the money is starting to flow, more institutions will be vying for pieces of the action.
- Institutions moving in this direction will need to work hard to overcome the research/learning disconnect and even harder to overcome the research/operations disconnect, and truly integrate sustainability across the entire campus.
- An increasing number of business and law schools will develop complementary concentrations in sustainable enterprise, perhaps creating a stronger on-campus presence of the Triple Bottom Line: people, planet, and profit.

Global Education

Fact: In rankings of top universities, worldwide, the United States still manages to hold nearly all of the top 25 slots, but others are gaining.

Our thoughts:

- We expect to see more formal collaborations and consortia among institutions across national boundaries, especially if new partnerships like the one announced last year between Yale, UC Berkeley, Australian National University, National University of Singapore, Peking University, the Swiss Federal Institute of Technology Zurich, the University of Copenhagen, and the University of Tokyo, show positive yields.
- More developing nations, particularly in Asia and the Middle East, will be waging campaigns to induce their most highly-educated professionals and faculty who are living abroad to return home; as living conditions and salaries improve, those efforts will be even more successful.
- Efforts to standardize accreditation across national boundaries will increase and be fraught with tension.
- The flow of quality students coming to the United States rather than elsewhere will probably increase in numbers, but those numbers will represent a steadily diminishing piece of the pie as the overall number of such students increases.

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Fact: **In Europe (and Australia), there is a growing move toward larger institutions, more massification of higher education, and funding models that feature less direct state support.**

- In Scotland, Dumfries and Galloway College is relocating to a new campus adjacent to the University of Glasgow, the University of Paisley, and Hamilton's Bell College. Is this the European quadrangle version of the North Carolina triangle?
- A vice chancellor's press release about the new Australian International University (AIU), states that "No trivial academic criteria will ever be allowed to stand in the way of genuine entrepreneurial ability and the desire to grow the business . . . ."
- In both Europe and Australia, the governments seem to have gotten past the initial waves of student resentment and rebellion about the funding changes.

Our thoughts:

- These countries will find a growing gap between students who can afford to pay tuition and those who cannot. How will they handle this?
- One answer might be their versions of community colleges, which in Australia seem to be developing as technical colleges.
- Even at the doctoral level, which involves fewer students, there is conflict among institutions about standardizing their PhD programs. How much more complicated will standardization of bachelors and masters degrees become?
- European institutions continue to enjoy relatively strong state funding support, but the trend is for that to diminish, as it has in the United States.
- Look for more attention in Europe to the same kind of 'brain drain' issues that the United States has faced.

Fact: **The greatest explosion ever seen in higher education is happening right now in Asia, especially in India and China.**

Our thoughts:

- What happens when the current state funding in China diminishes and students are expected to pay a larger portion of the fees?
- Even though India has 9.3 million students, that's only seven percent of its 18–24-year-olds and the country's shortage of graduates available for certain industrial sectors will grow.
- As the competition among countries for natural resources increases, will increasingly educated populaces suffice as a counter to thoughts of warfare to gain or protect such resources?

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Learning

Fact: John Merrow's widely viewed "Declining by Degrees" documentary for PBS contained some telling observations about higher education, especially his perception that there is a decline in the quality of education experienced by college students.

Our thoughts:
- There will be more strident calls for outcomes assessment within higher education and they will come from a broader range of constituencies.
- The federal government, while touting 'school choice' in higher education in support of such choice in K–12, will be increasingly eager to bring about some kind of postsecondary No Child Left Behind Act.
- If outcomes assessment becomes commonplace, there may be ripple effects on the basic building blocks of credentialing
- The portfolio, or 'eportfolio' movement, will soon be implementing viable products that will not only need to be accommodated in the current system, but will also affect outcomes assessment and have an impact on credentialing.
- External pressures for such changes will be felt most by schools that are less selective in their admissions.

Fact: Academic libraries have begun making great strides in adapting to changing student needs. Increasingly, new libraries, some without books and often called academic centers or academic commons, are designed for multiple uses and become successful student activity centers.

Our thoughts:
- Librarians will more and more consider the library as not just a place to store, find, and read books, but as the more academic counterpart to student unions and student centers.
- Libraries with books are a long way from disappearing.
- Every institution that has the capacity to create a "new library" with social spaces, technology, and perhaps books, will do so.
- Some institutions will follow the lead of San Jose State University, and others, by building such spaces on the campus edge, sharing funding and access with neighboring communities.
- However, offsite storage for most books, a route being taken by some institutions, may lead to resistance from scholars and faculty who are likely to find that inconvenient.

Fact: There is a movement in higher education to more closely examine the design of learning space—virtual and physical, formal and informal —and the effects of that design on learning. That exploration is being done collaboratively by faculty, technologists, and designers of the built environment.

Our thoughts:

- It is good to see this mix of professionals working together. Their collaboration could lead to a longer life for the four-year, brick and mortar, residential institutions.
- We may see more efforts to create a sense of place inside classrooms, as well as in unions and on open space.
- Look for more research and analysis on what students do and where they are 24x7, and attempts to find ways to instill learning in all of their environments. For example, students may find themselves receiving weekend text messages that contain content to be read for class the following week.
- A valuable side effect may be a strengthening of the educational mission in the roles of many more campus employees, such as residence administrators or even business officers and custodians.

Politics

Fact:

As the perceived and real price of a degree increases, as well as the percentage of costs borne by students and their families, criticism of traditional higher education institutions is increasing:

- Author Peter Smith, *The Quiet Crisis*, argues that higher education is currently structured in such a way that it simply cannot educate significant numbers of people with lower income status.
- The US Secretary of Education, Margaret Spellings, launched a Commission on the Future of Higher Education, saying that the US "needs a comprehensive national strategy for postsecondary education."
- The number of college graduates proficient in English fell from 40 percent in 1992 to 31 percent in 2003.
- A recent measure, taken as students prepare to graduate, indicated that more than "50 percent of students at four-year schools and 75 percent at two-year colleges lacked the skills to perform complex literacy tasks."

Our thoughts:

- The corporate trend to "do more with less" may increasingly encroach on colleges and universities, alarming nearly every part of the Academy.
- Along the same lines, investigations to clarify the "more" part of "do more with less," may propel further definition of the roles of two-year, four-year, and for-profit institutions.
- Institutions will be struggling to maintain higher education as an industry that takes good care of its employees; perks, health care, and wages at some institutions may be under pressure soon.
- The Commission on the Future of Higher Education is a wild card. Is it a sincere effort to find facts and gather opinions, or a stage from which to launch a predetermined agenda?

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Fact: The Higher Education Reauthorization Act is dead. No, it's alive. No, it's dead. This dance has gone on for a long, long time. And, while it goes on, it remains vulnerable to piecemeal changes such as the reduction in student loan funds, which happened at the turn of the year.

Our thoughts:

- The reluctance or inability of Congress to meaningfully consult with higher education experts and leaders while pushing ahead with remarkable changes like the Academic Competitiveness Grants Program will be even more unsettling if such actions continue.
- What if the Act is not renewed? People on campus may need to have contingency plans for that eventuality. Some will find that positive, others negative.
- The delays in passing the Act may continue to make higher education funds attractive targets for budget balancing.
- If the dance continues past July 2006, when the Commission on the Future of Higher Education's report is due, those findings may become enmeshed with the more than three years of work already done on the Higher Ed Reauthorization Act.
- A new federal administration and Congress in 2009 may find the Act still waiting to be passed.

Fact: It has been said that all politics is local. Relations between colleges and universities at the level of the surrounding community are becoming more complex and more visible.

- George Washington University, a large landowner in a top real estate market, is seen by some to be a "corporate developer first, not an educational facility."
- Patrols of student neighborhoods by community police on traditional 'party' nights are becoming more commonplace.
- Study after study confirms that college towns and their vicinities are "cool cities," retirement magnets, or "enlightened" places to live.

Our thoughts:

- Migration to college towns may make them even more economically viable regional engines, than they are now. Institutions may face increasing pressures for affordable housing for staff and faculty.
- Turf conflicts between campus safety officers and local police may increase. Wise institutions will ensure that lines of communication are open and in use.
- Some institutions will find that property they purchased 'in case' will become a revenue source for other projects as developers will want to use it, creating more private/public-type arrangements.

Technology

Fact: **Online learning is growing at its fastest rate in professional development training, and is fast becoming at least an adjunct source of information at residential four-year institutions as well.**

- Eighty percent of professional development in Canada now includes e-learning.
- Schools such as Duke University and Stanford are establishing the infrastructure for and implementing podcast archiving of lectures.
- Faculty members, however, are still more comfortable in the administrative and record-keeping uses of technology than in its learning applications.

Our thoughts:

- Expect to see many diverse methods of online learning delivery, frequently tailored to specific constituencies.
- Although their success has generated more scrutiny, for-profit learning companies will continue to do well, the mainstream higher education community will continue to do well but with a smaller piece of an overall larger pie.
- The bar is being raised regarding the 'entertaining' of students in class and may result in external pressure for faculty to get more 'with it' in their teaching styles.
- All of this, of course, is complicated by ever-increasing intellectual property issues.

Fact: **The cost of maintaining and developing IT infrastructure and services continues to grow, even as the private world of students and would-be students provides them with more and more technology tools outside the institution.**

- More bandwidth, newer equipment, and enhanced functionality mean higher costs.
- Computer modeling and inter-institutional research teams are showing great productivity gains for research in many fields, leading to faster, larger networks and pipelines.
- Students arrive with greater expectations for the level of connectivity and access to resources, tools, and support.

Our thoughts:

- The cost of IT to institutions, in absolute and relative terms (to budgets), is unlikely to peak and begin decreasing any time soon. Cost and funding will remain the top issue to watch.
- In addition to expecting bandwidth, access, and services, students may demand that institutional IT mesh better with the personal IT they own and use, or even wear.
- Institutions need to watch closely what communities and regions are doing on, for example, providing large-area wireless access and partner with them when doing so can minimize institutional expenditures.
- Demands from research for more bandwidth, more storage, and greater speed will only increase.
- The new Windows operating system, due out this year, may cause a demand for unbudgeted expenditures at some unprepared institutions.

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Fact: **Viruses/worms, privacy, and intellectual property issues bombard college and university staff.**

- At Indiana University recently, the largest growth in virus and worm incidents is through the use of instant messenger services.
- Students continue to treat university bandwidth and connectivity as a means to engage in fraudulent behavior with regard to intellectual property products.
- Many institutions have not yet moved from the use of Social Security numbers as identifiers in their enterprise systems.

Our thoughts:

- Although hackers constantly figure out new ways to infect machines, the commercial industry that provides protection from such things may mature enough to bring those kinds of issues lower down on the priority lists in the next few years.
- As more institutions provide more of their own intellectual property on line and in digital form, the owners or managers of that property may find common ground with groups such as the Recording Industry Association of America (RIAA).
- Wider and tighter institutional control of private information about students, staff, faculty, alums, prospective students, *et al.*, may come about in order to protect their privacy.

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